



# **AN INSIDE LOOK AT THE UK MARKET 2013/14 UK REPORT**



**Lauren Broughton, PR Manager  
Hills Balfour**



# ***UK MARKET SO WHAT'S NEW?***



# Market at a Glance – The Economy

## 2013 market

UK Population  
64 million

Greater London  
Population  
8.3million

GDP Increase of  
1.8%

Unemployment  
Rate  
7.2%

0.5% interest rate  
since  
2009 April

## 2014 expectations

- There is still fragility in the UK economy, but throughout 2014 it has performed well
- Unemployment dropped in 2014 and at the end of August stood at 6%
- UK's inflation has reduced, standing at 1.2% at the end of September 2014
- GDP is expected to grow by 3.2% in 2014 and by 2.7% in 2015



# Market at a Glance – UK Consumer Travel Habits

- **80%** of UK consumers took a **holiday** in the **12 months** to August 2013 - UK consumers love to travel!
- One in five UK consumers (21%) feel that a holiday is something they can't live without
- 26% of those aged over 55 say that a longer holiday overseas is a necessity  
*Source ABTA Travel Trends Report 2014*
- The USA is the top long-haul travel destination for Brits and the third most popular destination overall, following France and Spain
- In terms of spend, the UK is the fifth largest outbound market, globally (*UNWTO Tourism Highlights 2014 Edition*)



# Market at a Glance – UK Consumer Travel Habits

- In 2013, the number of outbound trips made by UK residents reached 56 million, a 2% rise on 2012 figures
- The positive growth contributed to the rise in outgoing tourist expenditure, which increased by 6% to reach £34 billion in 2013 (*Euromonitor International UK Country Report 2014*)
- In 2013 3,835,308 Brits visited the US, and between January and June 2014, 1,795,134 Brits had travelled to the USA, a 3.6% increase on 2013 figures (*ITA, Office of Travel & Tourism Industries*)



# ***Market at a Glance – The European Landscape***

## **Direct Flights**

Daily direct flight with British Airways from London Heathrow to Phoenix

UK consumers always give preference to destinations with direct air links

## **Language**

On average, Brits know less languages than many of their European neighbours

English speaking destinations – or destinations where English is widely spoken – are popular with holidaymakers

## **Island Nation**

Flying to a holiday destination is second nature and very common

Certain destinations can be reached by sea, rail or car within 24 hours, the options are less extensive than for French and German travellers

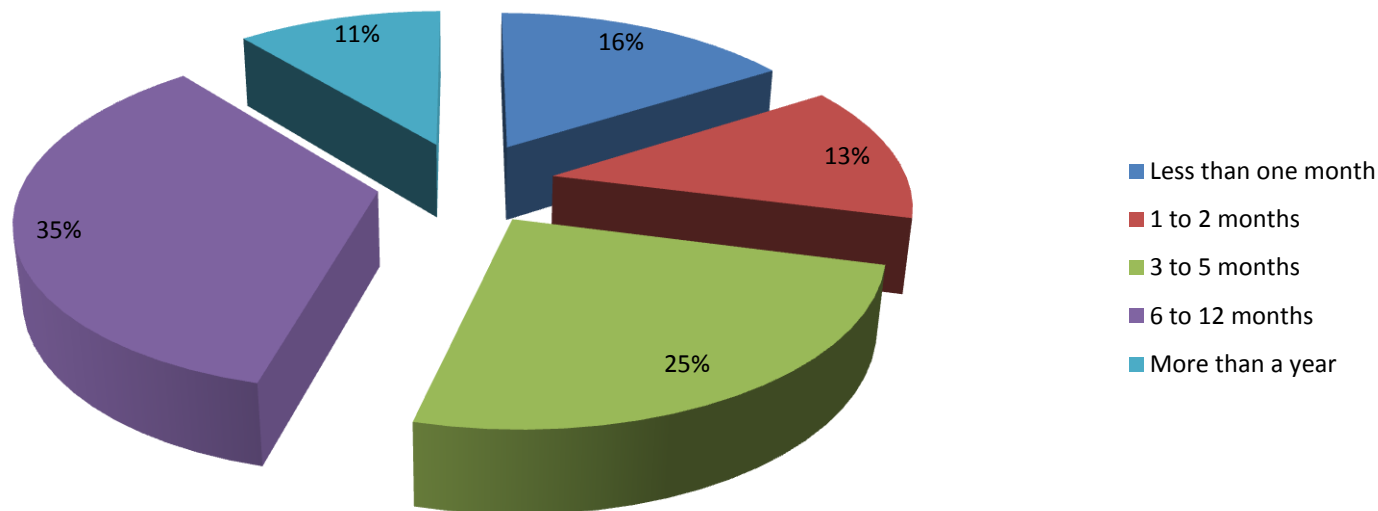
## **Currency**

Brits still use the Pound Sterling rather than the Euro, so while our economy has gone through peaks and troughs in the last ten years.

Fluctuations in our currency are less affected by the economic situations of our neighbouring countries

# MARKET AT A GLANCE – HOW CONSUMERS BOOK

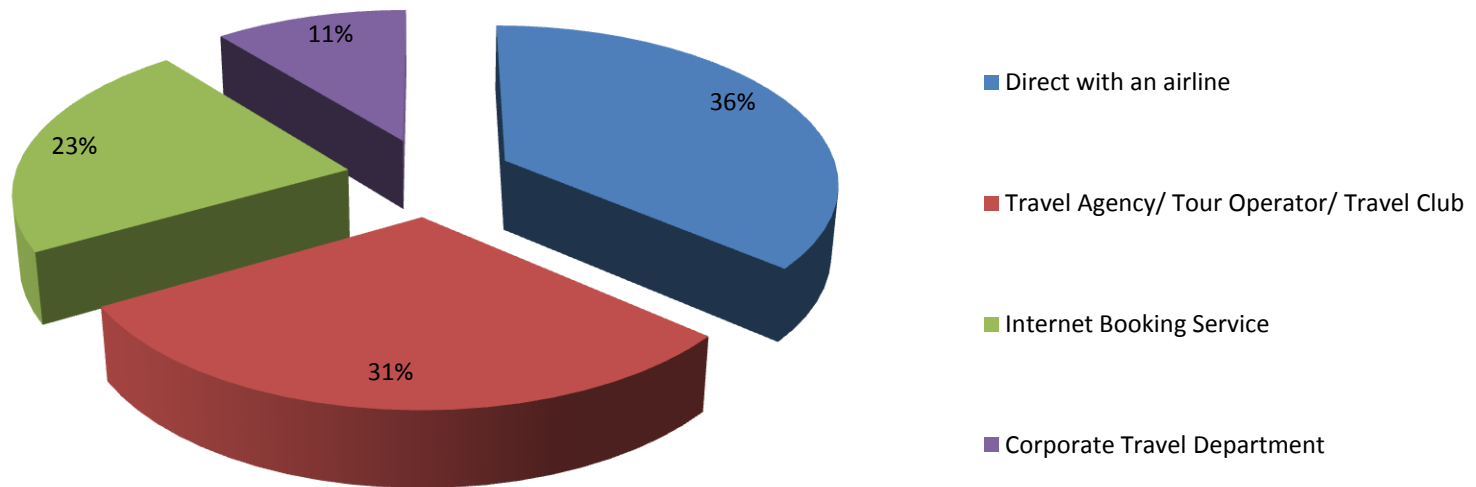
UK Consumers Advance Holiday Booking Time



- In the UK we like to plan in advance, especially when it comes to long haul holidays

# MARKET AT A GLANCE – HOW CONSUMERS BOOK

## UK Consumers Air Reservations



- Booking flights directly with an airline is UK consumers most popular booking method, followed closely by booking through a travel agency, tour operator or travel club



# MARKET AT A GLANCE – HOW CONSUMERS BOOK

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- 70% of consumers will book their accommodation in advance, with 74% opting for hotels/motels
- Hotels bookings were made in equal proportions across OTAs, directly with the hotel or through a travel agent, tour operator or travel club
- Brits see Arizona as a fly drive destination with 56% of people renting a car
- A continued trend in the UK over the last four years is the popularity of package holidays (flights, accommodation and transfers/car hire) - they were the most popular type of booking for those taking an overseas holiday during 2013
- Analysis of people who took an overseas holiday in the 12 months to August 2013 shows that 46% - around 16.5 million people - of holidaymakers booked a package



# ***OVERVIEW OF MEDIA MARKET IN THE UK***

# ***UK MEDIA – Newspaper Profiles***

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**How many national newspapers?**

**We're unusual in having more than just a few national newspapers.**

Because of the small geographical area of the UK, and the good travel infrastructure, there are many national newspapers

The main national papers are morning newspapers; indeed, there are no national evening titles

UK newspapers are generally grouped into three, rather historical, groups - mass market tabloids, or "red-tops", middle-market tabloids and broadsheets

Unlike other European countries, there are no daily all-sport newspapers



# UK MEDIA – Newspaper Profiles

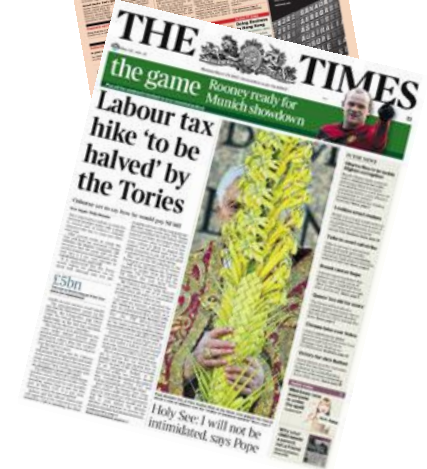
## Mass Market



## Middle-Market



## Broadsheet



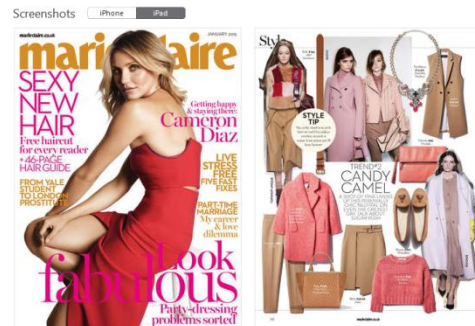


# UK Media – E magazines

- 2014 has seen an increasing number of both newspapers and magazines moving online as traditional advertising declines
- Numerous publications are starting to convert to digital as smart phones and tablets continue to rise in popularity
- In line with this, the travel industry has seen a positive trend towards journalists regularly securing commissions that span print, digital and online publications

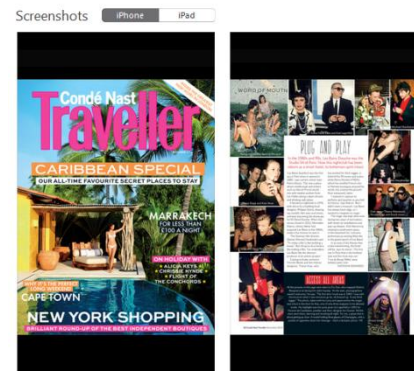
Marie Claire UK <sup>547</sup>  
Time Inc. (UK) Ltd >

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Condé Nast Traveller Magazine <sup>547</sup>  
Condé Nast Digital Britain >

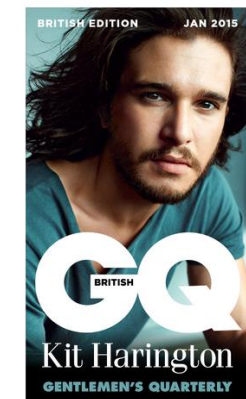
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GQ Magazine (UK) <sup>174</sup>  
Condé Nast Digital Britain >

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# UK MEDIA – Is print dead?

## No, print publications are alive and well in the UK

- In 2014 a number of new publications launched, all offering travel editorial opportunities. These included
  - *Hello! Fashion*
  - *Calibre magazine*
  - *Porter* (Fashion magazine for luxury online website Net-a-Porter)
- Travel specific magazines are still favoured by UK consumers, as show by the launch of travel magazine *Escapism* in March 2013. The publication now has a circulation to rival the UK's largest travel magazines, Condé Nast Traveller and *The Sunday Times Travel Magazine*



# UK Media – Social Media

- The internet is king in the UK with 65% of the population using internet search engines to look for holidays and inspiration
- According to data from the UK's Office for National Statistics, people in the UK were found to be the second most prolific social network users in Europe, behind the Netherlands
- Just over half of the UK population takes part in social networking
- You Tube is the most popular social media site with 40 million users. This is followed closely Facebook with 35.1 million users. Twitter has 11.9 million users and LinkedIn 11.3 users. Google plus has 8.3 million users.



# UK Media – Television and Radio

## Television

Television has been a highly resilient medium over the past 10 years

According to BARB the UK's TV audience measurement organisation, British adults spent 3.87 hours per day watching television in 2013

Since 2006 viewing has increased among audiences aged 55 and over, and remained stable among 16-24s (2.47 hours per day in 2013)

However, viewing among 25-34s has decreased from 3.5 to 3.08 hours per day since 2005

Travel needs to focus on niche opportunities – cooking, history, culture and reality in order to resonate with the audience today





# ***UK Media – Television and Radio***

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## **Radio**

The average amount of time UK adults spend listening to radio each week has dropped from 24.4 to 21.4 hours over the past ten years, according to RAJAR, which measures radio audience figures

This decrease has been largely driven by a drop among 15-24 year old listeners, from 21.8 hours in 2001 to 17 hours of listening a week in 2011

There has been a less pronounced drop for the 65+ audience; from 26.6 hours a week in 2001 to 25.8 hours in 2011



**BBC RADIO  
LEEDS**

# PR ACTIVITY & COVERAGE







# UK PR Summary – Group press trip

## Dedicated Irish Group – April/May 2014

- Attended by **seven of Ireland's top publications** – *Irish Daily Mirror*, *Irish Mail on Sunday*, *Irish Brides*, *Sunday Independent Ireland*, *Irish Daily Star*, *Sunday World* and *the Irish Sun*
- To date four pieces of coverage have appeared with a combined value of **\$215,631** and a combined circulation of **1,544,520**





# UK PR SUMMARY - UK MEDIA MISSION

During the 2014 UK media mission, the Arizona Office of Tourism met with 23 UK media.

travelweekly  
**woman**

THE SUNDAY TIMES  
**travel**  
magazine

**THE Sun**

**FAMILY TRAVELLER**  
LOVE YOUR TIME TOGETHER

NATIONAL  
GEOGRAPHIC

**TRAVELLER**

**GOLF**  
INTERNATIONAL  
MAGAZINE

**Daily Mail**

**TTG MEDIA**

**Chat**  
Your smart real-life read

**Baku.**

**GAYSTARNEWS**

SquareMeal

SUNDAY  
**PEOPLE**

**PRESS  
ASSOCIATION**

# UPCOMING ACTIVITY







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For more information contact  
Lauren Broughton, PR Manager, Hills Balfour  
[laurenb@hillsbalfour.com](mailto:laurenb@hillsbalfour.com)  
+44 (0) 207 367 0918